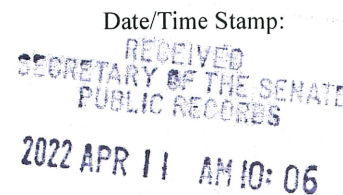


## Employee Post-Travel Disclosure of Travel Expenses



**Post-Travel Filing Instructions:** Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**  
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Senate Working Group

Private Sponsor(s) (list all): \_\_\_\_\_

Travel date(s): March 24-26, 2022

Name of accompanying family member (if any): none

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

### Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate	\$275	\$192	\$147	
<input type="checkbox"/> Actual Amount				

### Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	n/a	n/a	n/a	n/a
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. *See Senate Rule 35.2(c)(6).* (Attach additional pages if necessary.): See attachment

4/11/20  
(Date)

Adam Tomlinson  
(Printed name of traveler)

[Signature]  
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

4/11/22  
(Date)

[Signature]  
(Signature of Supervising Senator/Officer)

Adam Tomlinson

Attachment to Form RE-2

Per Senate Rule 35.2(c)(6), I attended each of the events listed below

Thursday, March 24

- Dinner Plenary Session – addresses from U.S. Senator Shelley Moore Capito and West Virginia Governor Jim Justice

Friday, March 25

- Interplay of Campaign Finance with Official Duties – Ryan Dollar, NRSC and FEC Commissioner Sean Cooksey
- Education and Critical Race Theory – Deroy Murdock, London Center for Policy Research
- Immigration – Daniel Garza, The Libre Institute
- Foreign Policy: U.S.-China Relations – Michael Sobolik, American Foreign Policy Council
- Inflation and the Economy – Dr. Michael Strain, American Enterprise Institute
- Women of the Senate Roundtable – Kristin Walker, Allyson Bell, Michelle Barlow Richardson, and Neri Martinez – U.S. Senate Chiefs of Staff
- How Issues are Received at Home: Ryan Munce, co/efficient and Travis Smith, Creative Direct

Saturday, March 26

- Redistricting 101: The Latest Challenges and how it impacts the Senate – Hans von Spakovsky, The Heritage Foundation
- A Discussion with Committee Staff Directors (I served as a panelist for this event along with fellow staff directors Jon Towers, Pam Thiessen, Arjun Mody, Brad Grantz, and Neri Martinez)



Date/Time Stamp:

**EMPLOYEE PRE-TRAVEL AUTHORIZATION**

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Adam Tomlinson

Employing Office/Committee: Senate EPW Committee Minority

Private Sponsor(s) (list all): Senate Working Group

Travel date(s): March 24-26, 2022

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): The Greenbrier, 101 W Main St, White Sulphur Springs, WV 24986

Explain how this trip is specifically connected to the traveler's official or representational duties:

The symposium is an educational training program that provides access to vital resources and information not provided for in the Senate that is beneficial for fulfilling of my official duties as the EPW minority staff director. It is scheduled to include sessions with other staff directors regarding ways to better coordinate with various committees; an ethics session to ensure that any communication or off hours campaign work complies with Senate rules and other statutes; and a messaging session geared toward helping to better communicate committee policies to the public.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

2-1-22  
(Date)

ADAM TOMLINSON  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Sen. Shelley Moore Capito hereby authorize Adam Tomlinson  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

2/1/22  
(Date)

Shelley Moore Capito  
(Signature of Supervising Senator/Officer)

**Tomlinson, Adam (EPW)**

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**From:** Tomlinson, Adam (EPW) <Adam\_Tomlinson@epw.senate.gov>  
**Sent:** Friday, March 11, 2022 2:51 PM  
**To:** Mortimer, Dominique (Ethics)  
**Subject:** Fwd: Sen. Capito Invite to the Chief's Retreat

Dominique -

Here is the invitation I received. Please let me know if there is anything else you need.

Adam

Sent from my iPhone

Begin forwarded message:

**From:** James Kimmey <james@senateworkinggroup.org>  
**Date:** January 20, 2022 at 5:04:07 PM EST  
**Subject:** Sen. Capito Invite to the Chief's Retreat

2022 Senate Republican  
Chiefs of Staff &  
Committee Staff Director's  
Retreat

**SENATE  
WORKING  
GROUP.**



***Invitation to the 2022 Senate Republican Chiefs of Staff & Committee Staff Director's Retreat***

Dear Joel & Adam,

On behalf of Senate Working Group, we would like to cordially invite you and your spouse to the first ever, *Senate Republican Chiefs of Staff & Committee Staff Director's Retreat*. The event will be held **March 24 - 26, 2022 at The Greenbrier Resort in White Sulphur Springs, West Virginia.**

The retreat is the largest concentration of Republican Senate Chiefs of Staff and Committee Staff Directors outside of Washington, D.C. Bringing together our country's leaders, policy experts, and thought leaders beyond the confines of our nation's capital, this retreat serves to provide an educational deep dive into the issues affecting our country. In addition to the Chiefs of Staff, Staff Directors, and their guests, Senate Working Group members will also attend portions of the retreat.

Senate Working Group is a registered 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate Staff. Founded in 2021, Senate Working Group hosts numerous educational trainings, workshops, and networking events throughout the year, including its signature *Retreat*. Senate Working Group does not employ or hire lobbyists and is funded solely by private and corporate donations.

### **Step 1: Register for the event!**

Senate Working Group will coordinate all logistical arrangements for the retreat, including room reservations, meals, mileage reimbursement, meetings, and other activities during the retreat. Senate Working Group will happily cover the cost of participation for each invitee and their spouse. You are welcome to bring your children, though you will be responsible for the costs of their participation. All reservations must be made through Senate Working Group.

To register, please click the below link and add the corresponding access code when prompted. Once you answer each question within the registration process, you will be sent a confirmation email with additional details, including a calendar invite.

**Registration link:** <https://www.senateworkinggroup.org/chiefs-committee-member-reg>

**Access Code:** 2022retreat

### **Step 2: Submit Ethics Packet by Friday, February 18, 2022!**



To comply with Ethics' rules, you will need pre-authorization from the Select Committee on Ethics. By following "Step 1" and registering for the event, you will be sent Senate Working Group's **Private Sponsor Travel Certification Form**. Once you receive the form, please submit it along with your completed **Employee Pre-Travel Authorization** form by **Friday, February 18, 2022**.

Failure to submit your form 30 days prior to the event means we will be unable to cover the cost of your attendance and you would need to cover the cost personally. Please note that the 30<sup>th</sup> day coincides with President's Day Weekend, so please submit your paperwork no later than **Friday, February 18, 2022**.

Additionally, you must file your **Employee Post-Travel Disclosure of Travel Expenses** with the Office of Public Records within 30 days of your return – **submit by April 25, 2022**.

Finally, we understand your attendance is pending Ethics' approval. More information on the retreat will be sent to you in the weeks leading up to the event. If you have any questions, concerns, or need additional information, please contact me directly at (858) 336-0293 or [james@senateworkinggroup.org](mailto:james@senateworkinggroup.org).

Thank you for your consideration and I look forward to hearing from you!

Sincerely,

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9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Senate Working Group is the sole sponsor for this event, and has financed and organized the symposium.

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

Please see attached document.

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Senate Working Group is a new organization, created on October 8, 2021. Senate Working Group has not  
previously sponsored any congressional trips.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Senate Working Group plans to provide educational trainings, as well as host widely attended events, throughout the calendar year. These trainings and events will be offered to all Senate staff, from Chiefs of Staff to Senate Interns.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$275	\$192	\$147	
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This event was arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Given that the event is classified as a symposium, we want the event to be outside of Washington, D.C.

However, to ensure attendance and minimal travel costs, we chose having the event in West Virginia.

19. Name and location of hotel or other lodging facility:

The Greenbrier Resort, 101 W. Main St. White Sulphur Springs, WV 24986

20. Reason(s) for selecting hotel or other lodging facility:

We selected the Greenbrier due to its outstanding reputation in hosting similar events and its close proximity to Washington, D.C.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

All expenses are at or below per diem

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Mileage reimbursed

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:



Name and Title: James Kimmey, Executive Director

Name of Organization: Senate Working Group, Inc.

Address: 1825 I Street NW, Suite 900, Washington, D.C. 20006

Telephone Number: (858) 336-0293

Fax Number:

E-mail Address: James@senateworkinggroup.org

Private Sponsor Travel Certification Form  
Attachment

**Question 5**

In response to question 5, the following individuals are invited:

Honorable Roger Marshall, Senator (Kansas)

Honorable Shelley Moore Capito, Senator (West Virginia)

Dan Kunsman, Chief-of-Staff, Senator Barrasso

Sean Farrell, Chief-of-Staff, Senator Blackburn

Stacy McBride, Chief-of-Staff, Senator Blunt

Toni-Marie Higgins, Chief-of-Staff, Senator Boozman

Josh Kelley, Chief-of-Staff, Senator Braun

Natasha Hickman, Chief-of-Staff, Senator Burr

James Quinn, Chief-of-Staff, Senator Cassidy

Steve Abbott, Chief-of-Staff, Senator Collins

Beth Jafari, Chief-of-Staff, Senator Cornyn

Doug Coutts, Chief-of-Staff, Senator Cotton

Mark Gruman, Chief-of-Staff, Senator Cramer

Susan Wheeler, Chief-of-Staff, Senator Crapo

Steve Chartan, Chief-of-Staff, Senator Cruz

Jason Thielman, Chief-of-Staff, Senator Daines

Lisa Goeas, Chief-of-Staff, Senator Ernst

Emily Leviner, Chief-of-Staff, Senator Fischer

Richard Perry, Chief-of-Staff, Senator Graham

Aaron Cummings, Chief-of-Staff, Senator Grassley

Adam Telle, Chief-of-Staff, Senator Hagerty

Eric Teetsel, Chief-of-Staff, Senator Hawley

Tony Eberhard, Chief-of-Staff, Senator Hoeven

Doug Davis, Chief-of-Staff, Senator Hyde-Smith

Luke Holland, Chief-of-Staff, Senator Inhofe

Sean Riley, Chief-of-Staff, Senator Johnson

David Stokes, Chief-of-Staff, Senator Kennedy

Michelle Altman, Chief-of-Staff, Senator Lankford



Allyson Bell, Chief-of-Staff, Senator Lee  
Brent Robertson, Chief-of-Staff, Senator Marshall  
Sharon Soderstrom, Chief-of-Staff, Leader McConnell  
Terry Carmack, Chief-of-Staff, Leader McConnell  
James Kelly, Chief-of-Staff, Senator Moran  
Kaleb Froehlich, Chief-of-Staff, Senator Murkowski  
William Henderson, Chief-of-Staff, Senator Paul  
Kevin Smith, Chief-of-Staff, Senator Portman  
Ryan White, Chief-of-Staff, Senator Risch  
Liz Johnson, Chief-of-Staff, Senator Romney  
Kyle Chase, Chief-of-Staff, Senator Rounds  
Mike Needham, Chief-of-Staff, Senator Rubio  
Ray Sass, Chief-of-Staff, Senator Sasse  
Craig Carbone, Chief-of-Staff, Senator Rick Scott  
Jennifer DeCasper, Chief-of-Staff, Senator Tim Scott  
Watson Donald, Chief-of-Staff, Senator Shelby  
Larry Burton, Chief-of-Staff, Senator Sullivan  
Ryan Nelson, Chief-of-Staff, Senator Thune  
Ted Lehman, Chief-of-Staff, Senator Tillis  
Dan Brandt, Chief-of-Staff, Senator Toomey  
Stephen Boyd, Chief-of-Staff, Senator Tuberville  
Michelle Richardson, Chief-of-Staff, Senator Wicker  
John Connell, Chief-of-Staff, Senator Young  
Neri Martinez, Staff Director, Select Committee on Aging  
Fitz Elder, Staff Director, Committee on Agriculture, Nutrition, and Forestry  
Shannon Hines, Staff Director, Appropriations Committee  
John Wason, Staff Director, Armed Services Committee  
Brad Grantz, Staff Director, Committee on Banking, Housing, and Urban Affairs  
Nick Myers, Staff Director, Committee on the Budget  
John Keast, Staff Director, Committee on Commerce, Science, and Transportation  
Richard Russell, Staff Director, Committee on Energy and Natural Resources  
Adam Tomlinson, Staff Director, Committee on Environment and Public Works  
Gregg Richard, Staff Director, Finance Committee

Arjun Mody, Staff Director, Senate Republican Conference

Chris Socha, Staff Director, Committee on Foreign Relations

David Cleary, Staff Director, Committee on Health, Education, Labor, and Pensions

Pam Thiessen, Staff Director, Committee on Homeland Security & Government Affairs

Brian Walsh, Staff Director, Intelligence Committee

Kolan Davis, Staff Director, Judiciary Committee

William Henderson, Staff Director, Committee on Small Business & Entrepreneurship

Jon Towers, Staff Director, Committee on Veterans' Affairs

Kristi Williams, Staff Director, Committee on Indian Affairs

### Question 13

In response to question 13, Senate Working Group is a 501(c)(4) nonprofit organization dedicated to providing educational resources to Senate staff. In addition to local trainings and receptions throughout the year, the 2022 Chief-of-Staff and Committee Staff Director's Symposium provides us the ability to connect Senate staff with policy experts and thought leaders in an intimate, off-the-record setting.

**Senate Working Group**  
**2022 Senate Republican Chief-of-Staff & Committee Staff Director's Symposium**  
**March 24-26, 2022**

**Thursday, March 24, 2022**

**6:00 PM - 8:00 PM - Opening Dinner Plenary**

*This two-hour, opening dinner plenary session will examine the issues that are driving constituents back home and how Senate members can work alongside one another to bring light to these issues. Whether it's the economy or education, Americans are increasingly concerned over the issues that impact them the most. The purpose of this session is to examine those issues and get diverse perspectives from the state and federal level officials.*

Speakers: James Kimmey, Executive Director, Senate Working Group  
Honorable Jim Justice, Governor, West Virginia  
Honorable Shelley Moore Capito, Senator (West Virginia)  
Mary Katharine Ham, Moderator

**Friday, March 25, 2022**

**8:00 AM – 9:00 AM**

**Interplay of Campaign Finance with Official Senate Duties (1 hour)**

*There are always questions on what can and cannot be done when working in the Senate. The purpose of this session is to break down the senate ethics rules along with an explanation on how to comply with campaign finance regulations while carrying out official Senate duties during the 2022 election cycle.*

Speaker(s): Ryan Dollar, Esq., National Republican Senatorial Committee  
Honorable Sean Cooksey, Commissioner, Federal Election Commission

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**9:00 AM - 12:00 PM - Morning Plenary Session**

**Policy Lighting Round: A Deeper Dive into Kitchen Table Issues (3 hours)**

*This three-hour, morning brunch plenary will go deeper into the "kitchen table issues" which were introduced the night prior. Kitchen Table issues are issues that are of concern to the average person that might be discussed by the family around a kitchen table. Featuring policy experts from various prominent think-tanks, we will look into Education, specifically the Critical Race Theory, Immigration, Foreign Policy, specifically U.S. – China relations, and the Economy, specifically the impact of inflation. Each topic will be broken down into 45-minute segments. Each segment will give the speaker 20 - 30 minutes to introduce and discuss the issue, then will leave 15 or more minutes to take questions from the audience.*

Speaker(s): Deroy Murdock, Senior Fellow at the London Center for Policy Research  
Education and Critical Race Theory  
9:00 AM – 9:45 AM



discussion on campaign-related activity at this seminar.

Speakers: Ryan Munce, co/efficient  
Travis Smith, Creative Direct

**8:15PM – 9:45PM – The Impact of New Media**

*As #1 political podcast in America, the hosts of The Ruthless Podcast will share their experience utilizing new media to connect with millions of Americans and how it impacted the way people view politics. As former Hill Staffers, they will share their experience both on and off the Hill, and how their podcast impacts the national political conversation.*

Speakers: James “Josh” Holmes, The Ruthless Podcast  
Michael Duncan, The Ruthless Podcast  
Shashank Tripathi, The Ruthless Podcast  
John Ashbrook, The Ruthless Podcast  
Brent Robertson, Chief of Staff, Moderator

**9:45PM – 10:00PM** – James Kimme, Executive Director of Senate Working Group will close out the dinner by giving closing remarks, thanking those in attendance, and provide information on future Senate Working Group events.

**Saturday, March 26, 2022**

**8:30 AM – 9:15 AM**

**Redistricting 101: The Latest Challenges and How It Impacts the Senate (45 min.)**

*The purpose of this 45-minute presentation is to explain the new congressional maps created as a result of the 2020 census. The speaker will explain the various metrics that went into the creation of the maps, i.e., makeup of state legislatures, non-partisan commissions, etc., and then show how it will impact the incoming Congress. Please note that there will be no discussion on campaign-related activity at this seminar.*

Speaker: Honorable Hans von Spakovsky, The Heritage Foundation

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**9:15 AM – 10:45 AM**

**A Discussion with Committee Staff Directors**

*Transparency and communication is important, our hope is that this session provides each attendee an opportunity to hear from the various Committee Staff Director's in attendance, better understand their role, and ways each office can work the committees to better serve their members and constituents.*

Speaker(s): Jon Towers, Staff Director  
Pam Thiessen, Staff Director

Daniel Garza, The Libre Institute  
Immigration  
9:45 AM – 10:30 AM

Michael Sobolik, American Foreign Policy Council  
Foreign Policy: U.S. – China Relations  
10:30 AM – 11:15 AM

Dr. Michael Strain, American Enterprise Institute  
Inflation and the Economy  
11:15 AM – 12:00 PM

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**12:00PM - 3:00PM – Executive Time**

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**3:00PM – 4:00 PM – Women of the Senate Roundtable (1 hour)**

*The purpose of the roundtable is to discuss the challenges/ opportunities women senior staff members encounter while working on the Hill along with a discussion on increasing diversity among Senate members and how an increase in female voices will positively impact various pieces of legislation.*

Speakers: Kristin Walker, Chief of Staff  
Allyson Bell, Chief of Staff  
Michelle Barlow Richardson, Chief of Staff  
Neri Martinez, Staff Director  
Mary Katharine Ham, Moderator

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**5:00PM - 7:00PM - Reception (2 hours)**

*The purpose of this reception is for each attendee to network with other attendees and speakers. There will be no speakers for this reception, if announcements need to be made, they will be made by James Kimmey, Executive Director of Senate Working Group.*

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**7:00pm - 10:00PM - Dinner Plenary Session (3 hours)**

**7:00PM – 7:15PM – Welcome remarks by James Kimmey, Senate Working Group**

**7:15PM – 8:15PM – How the Issues Are Received at Home**

Whether it's the economy, education, voting rights or immigration, there are many legislative issues on the front of many American's minds. The purpose of this session is to examine the key legislative issues that are important to American voters. This session will focus on regional and national trends and how the Senate can influence those issues. Please note that there will be no

Arjun Mody, Staff Director  
Brad Grantz, Staff Director  
Adam Tomlinson, Staff Director  
Neri Martinez, Staff Director  
Mary Katharine Ham (Moderator)

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**10:45 AM – 11:00 AM**

**Farewell Remarks**

Speaker: James Kimmey, Executive Director, Senate Working Group

**Symposium concludes at 11:00 AM**



CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN  
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII  
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO  
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR  
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220  
SECOND AND CONSTITUTION AVENUE, NE  
WASHINGTON, DC 20510-6425

TELEPHONE: (202) 224-2981  
FACSIMILE: (202) 224-7416  
TDD: (202) 228-3752

## United States Senate

SELECT COMMITTEE ON ETHICS

March 22, 2022

Adam Tomlinson  
Committee on Environment and Public Works  
United States Senate  
Washington, DC 20510

Dear Mr. Tomlinson:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you to travel to the *2022 Senate Republican Chief of Staff and Committee Staff Director's Symposium* in White Sulphur Springs, West Virginia, on March 24–26, 2022, sponsored by Senate Working Group. Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip.

### Background

Based on your communication with the Committee, the background in this matter is as follows.<sup>1</sup> You are employed as a staff director for the committee on environment and public works and Senator Shelley Moore Capito is your supervising Senator. Senate Working Group invited you to travel to the *2022 Senate Republican Chief of Staff and Committee Staff Director's Symposium* in White Sulphur Springs, West Virginia, on March 24–26, 2022. Senate Working Group certified to the Committee that it will pay the necessary expenses<sup>2</sup> related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. Senate Working Group has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.<sup>3</sup>

### Discussion

Privately-sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments, and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's

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<sup>1</sup> If this letter does not correctly recite the facts, contact the Committee immediately.

<sup>2</sup> The term "necessary expenses" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

<sup>3</sup> The term "any point throughout your trip" has a specific definition. See *id.* at 2.

official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110-81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately-sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately-Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.<sup>4</sup> This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.<sup>5</sup>

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel.**

Consistent with these standards and Committee precedent, and Senate Working Group's factual representations, it appears that it is permissible for you to accept necessary expenses from Senate Working Group in connection with this trip, provided that the actual travel and travel-related expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records).

Finally, Senate Rule 34 requires a reporting individual,<sup>6</sup> on their Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$415 from that sponsor during a calendar year. However, if a Member,

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<sup>4</sup> The term "*de minimis*" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 3.

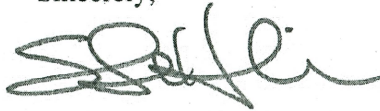
<sup>5</sup> See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel* at 5; see also *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2-3.

<sup>6</sup> A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$135,468 for CY 2022) or is a political fund designee and is required to file Financial Disclosure Reports.

officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

A handwritten signature in dark ink, appearing to read 'Shannon Hamilton Kopplin', with a stylized, cursive script.

Shannon Hamilton Kopplin  
Chief Counsel and Staff Director

Enclosure: Travel Checklist